

The City of South Tucson, Arizona Retail Market Analysis

The Draft Market Study

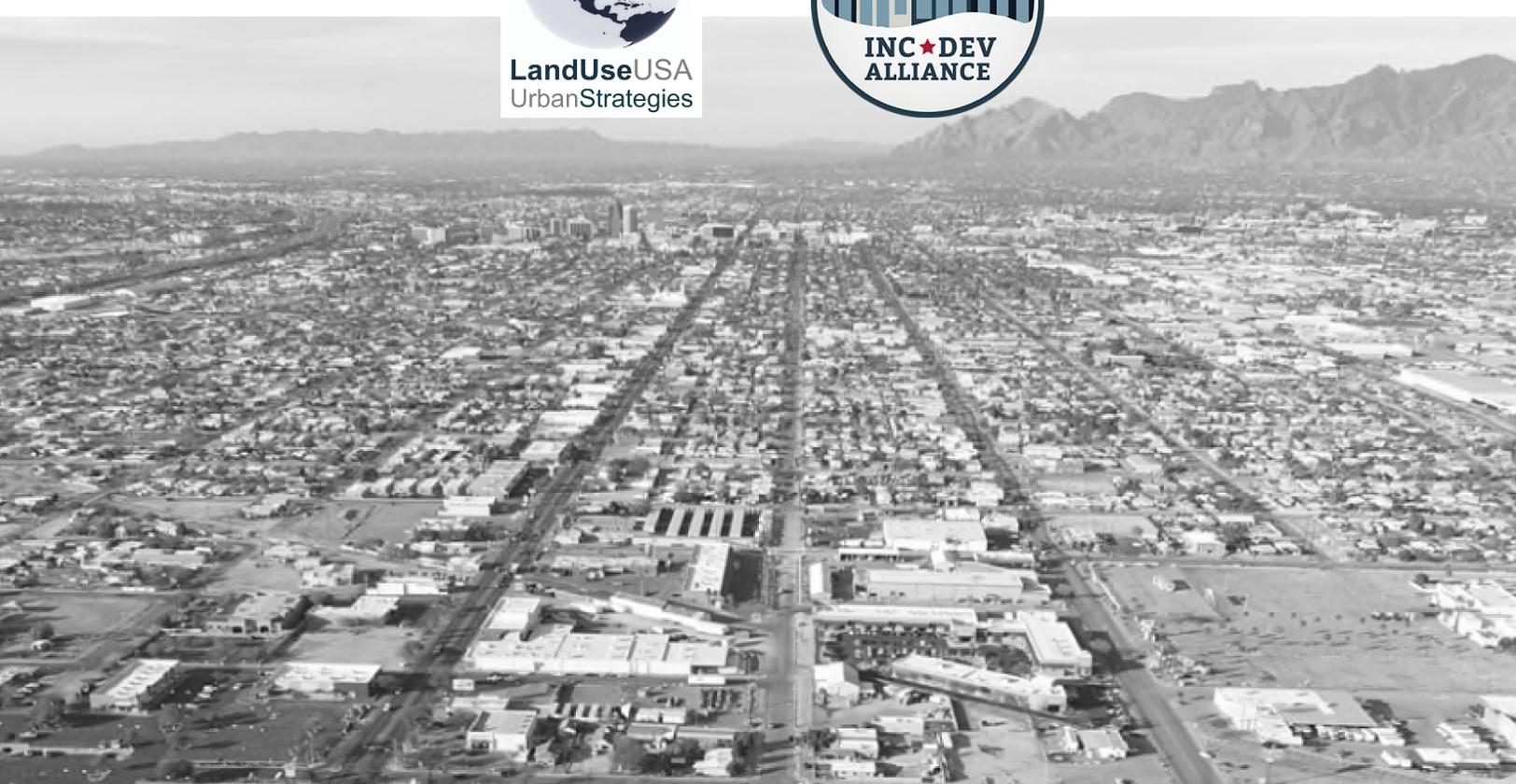
April 13, 2021

Analysis
prepared by:



LandUseUSA
UrbanStrategies

In collaboration
with:



Acknowledgements

LandUseUSA | Urban Strategies has prepared this Retail Market Analysis for the City of South Tucson, Arizona. The city is centrally located in Pima County and surrounded on all four sides by the larger City of Tucson. This study has been completed in collaboration with the Incremental Development Alliance; through a collaborative effort among public and private stakeholders; and with funding and project assistance from the Pima County Housing Center.

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This retail study has been prepared by Sharon Woods, President of LandUseUSA | Urban Strategies. The firm was founded in 2008 and is located in the Greater Lansing Metropolitan Area in Central Michigan. Lansing is also home to Michigan's state capital, department of treasury, land bank, and economic development corporation. LandUseUSA's contact information is provided below:

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General Work Approach

Introduction

This retail market study is an abbreviated work approach and does not represent a comprehensive or complete retail supply-demand or gap analysis. Although it considers South Tucson's advantageous proximity to Downtown Tucson, it has not included delineation of primary or effective trade areas. It has involved an inventory of retailers and complementary types of businesses in the City of South Tucson; but does not fully consider the influence of competing retail throughout the surrounding City of Tucson. It also has not included any in-person market tours or field work; and has not involved a detailed supply-demand and gap analysis.

With those caveats, this retail market study has included a detailed inventory of retailers and businesses that had been in the market prior to the Covid-19 pandemic and retail crisis (see Section A); a study of the 2017 Economic Census (Section B through Section E); a study of commuter or worker flow (Section F); and a study of demand variables or retail market parameters (see Section G). Results are briefly described in the following pages of this narrative report.

Strategy and Inventory

Section A

This retail market study has involved a detailed inventory of all retailers and other businesses throughout the City of South Tucson. These businesses have been clustered into an attached list by general subcategory, and then numbered within those categories. For example, the inventory includes four (4) retailers making tortillas; and six (6) retailers offering other types of specialty foods.

Other important establishments include a Garden Kitchen culinary center (sponsored through the University of Arizona); a Balloon Land party planning store; Montano's Fashion bridal shop, and Royal Prestige Arizona offering additional culinary courses. There is also an El Casino Ballroom; Club 4th Avenue Music Stage; and several dance schools in the performing arts. Last but not least, there are also a few artisans like Indigenous Alliance, Joanna's Healing Arts, Galeria Mitotera, and Marcela Norr.

There are some important limitations to the inventory that should be noted. First, the inventory has not been verified through field research or market tours. Second, some of the businesses could have closed during the recent Covid-19 pandemic and economic crisis. Therefore, the inventory should be used only as a general guide to the types of businesses that have or had been established within the city over the past two years; and not as documentation of what is currently open for business.

The inventory also does not include restaurants, eateries, and drinking establishments. In general, this is one of South Tucson's market strengths and advantages. A detailed inventory of existing restaurants is not likely to change the conclusion that more variety would be a good thing. Restaurants tend to thrive when they are clustered together and collectively achieve critical mass – so, the more the better.

Restaurants and overnight accommodations aside, LandUseUSA has used the inventory to deduce that the City of South Tucson could support up to 10 new retailers and complementary types of businesses in the event planning industry. In addition, the city could support at least 10 retailers and businesses in other retail sectors, including home furnishings, apparel, sporting goods, home improvement, automotive parts, toys and hobby, and used merchandise.

Several of these new businesses could be operated by local artisans offering artisanal products that are locally made. For example, a craft supply store could offer classes hosted by local artists; and florists, chocolatiers, seamstresses, music teachers, DJ's, and party planners could also be local artisans. Assuming that these types of venues can cluster together as co-tenants in a new retail project, then they could also help generate shopper traffic needed to support an art gallery with kiosks, similar to an artisan "makerspace".

These findings are generally supported by the gap analysis, which is described in the next section of this narrative report.

Gap Analysis by Variable

Sections B - E

The work has also included a study of the 2017 U.S. Economic Census, which provides data on the number of existing establishments, aggregate revenues, and number of employees by retail and business category. Note: The next economic census will be completed in 2022; and results will become available in 2024. An update of this retail market study would be prudent at that time.

It is also important to note that because the City of South Tucson is relatively small, the census suppresses the data for most retail subcategories. In fact, detailed data is provided for only two retail subcategories, including automotive parts and grocery stores. Therefore, we expanded the analysis by including several non-retail categories, including overnight accommodations (i.e., hotels and motels); restaurants and drinking establishments; automotive service and repair shops; and arts, entertainment, and recreation.

The retail market parameters and limited data provided by the economic census have been used to calculate four inter-related variables, including sales per establishments (see Section B), sales per capita (Section C), market share or sales per capita as a share of income (Section D), and jobs per capita (Section E).

Results for the City of South Tucson have been compared to the averages for Pima County and the State of Arizona. If the city is not keeping up with those county and state averages, then a “gap” is deduced. If the city is keeping up or surpassing the county and state averages, then the market is generally considered to be adequately served. The list on the next page provides a summary of key findings.

Based on the results, it is safe to conclude that the City of South Tucson has a measurable and tangible gap in retail trade as well as restaurants. It is also safe to conclude that the city’s existing automotive repair and service shops are underperforming relative to averages for the county and state. However, it is unlikely that there is sufficient market support for additional establishments in that category.

Gap Analysis of 2017 Economic Census
Summary of Results by Industry

Business Category	Sales per Estab.	Sales per Capita	Market Share	Jobs per Capita
Automotive Parts	.	.	.	.
Grocery Stores	.	.	.	.
Total Retail Trade	Gap	Gap	.	Gap
Overnight Accom	.	.	.	.
Restaurants, Eateries	Gap	.	.	Gap
Auto Service Shops	Gap	.	.	.
Arts, Entertainment	.	.	.	.

Based on a more detailed study of current and potential jobs per capita, LandUseUSA concludes that the City of South Tucson could support up to 55 new jobs within the retail trade industry alone. Assuming that each small business has at least two employees (including an owner and one assistant), this suggests that the city could support at least 20 new retail establishments. This category includes small retail merchants only; and does not include non-retail services, restaurants and eateries, or arts and entertainment venues.

In addition, we have determined that the market could support up to 34 new jobs in the category of overnight accommodations, including hotels, motels, inns, and bed & breakfasts. If it is assumed that each new establishment hires at least 10 employees (including managers, receptionists, cleaning and maintenance workers, etc.), then this implies a market gap and opportunities for about three (3) new establishments.

Retail Market Parameters

Section G

This retail analysis work has included a high-level analysis of population, per capita income, total personal income, and retail expenditure potential for the City of South Tucson. Comparisons are also provided for the City of Tucson, Pima County, and the State of Arizona.

The City of South Tucson currently has a population that is approaching 6,000 residents; and it is gaining between 15 and 20 new residents annually. The residents have a low per capita income of less than \$15,000, compared to about \$25,000 for the neighboring City of Tucson; and \$30,000 for Pima County and the State of Arizona.

Other variables complement to the analysis, including age cohorts, educational attainment, and employment. Readers are encouraged to study the data, note differences between the two cities with the county and state, and draw correlations and conclusions from those observations.

End of Report

Retail Market Analysis

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Section A

Potential Retail Gaps and Opportunities
 The City of South Tucson, Arizona | February 2020

Count Gaps	Description of Retail Opportunity	General Category	Sq. Ft.
1	Bowling, Pinball Arcade, Bounce House	event planning	15,000
2	Craft, Artisan, Fabric Supply Store	event planning	2,000
3	Artisanal chocolates, cakes, sweets	event planning	1,000
4	Men's Tuxedo and Suit Rental	event planning	1,000
5	Florist with Gift Shop	event planning	1,000
6	Christian / Catholic Book & Gift Store	event planning	1,000
7	DJ's, Musicians, Performing Arts	event planning	500
8	Alterations, sewing, beading	event planning	500
9	Music Teachers, Instructors	event planning	500
10	Party Planning Consultant	event planning	500
		SUBTOTAL	<u>23,000</u>
1	Auction House	used merchandise	6,000
2	Motorcycles, motorsports	dealership	6,000
3	Ready-to-Assemble Furniture	home furnishings	6,000
4	Art Gallery with Kiosks	artisan	3,000
5	Family Apparel, Men's Rugged Wear	apparel	2,000
6	Child Care Services	child care services	2,000
7	Furniture Restoration, Re-upholstery	used merchandise	2,000
8	Play it Again sports equipment	sporting goods	1,500
9	Lighting and Electrical Supply Store	home improvement	1,500
10	Automotive Stereo Equipment	auto parts	1,000
11	Toys, Games, Comics, Collectibles	toys and hobby	1,000
12	.	.	.
13	.	.	.
14	.	.	.
15	.	.	.
		SUBTOTAL	<u>32,000</u>
		GRAND TOTAL	55,000

Source: Based on a desk-top inventory and assessment of established businesses. Analysis and exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; 2021. Recommendations are highly preliminary and have not been verified by a market-wide gap analysis.

Existing Businesses by General Category

The City of South Tucson, Arizona | February 2020

Count	Description of Retail Opportunity	General Category
Existing		
gap	Artisanal chocolates, cakes, sweets	specialty foods
1	Food City	grocery
2	Delgado's Food Svc - produce, juice	specialty foods
3	Food Distribution Center	specialty foods
4	Holsum Bakery Outlet	specialty foods
5	Malone Meat & Poultry	specialty foods
6	Tylers Coffee	specialty foods
1	Tortillas de Harina Linda	specialty foods - tortillas
2	Tortillas Bryan	specialty foods - tortillas
3	Don Chava Tortillas	specialty foods - tortillas
4	Dona Esperanza Tortillas	specialty foods - tortillas
1	Walgreens	pharmacy
2	Family Dollar	variety
3	Circle K	convenience
1	Ben's United Market Liquor	grocery - liquor
2	Valencia Market	grocery - liquor
gap	Men's Tuxedo and Suit Rental	event planning
gap	Florist	event planning
1	Garden Kitchen Univ of AZ	event planning
2	Quinceaneras / Balloon Land party plan	event planning
3	Montano's Fashion - bridal	event planning
4	Royal Prestige Arizona - culinary arts	event planning

Source: Based on a desk-top inventory and assessment of established businesses. Analysis and exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; 2021.

Existing Businesses by General Category

The City of South Tucson, Arizona | February 2020

Count	Description of Retail Opportunity	General Category
Existing		
gap	DJ's, Musicians, Performing Arts	entertainment
1	El Casino Ballroom	entertainment
2	Club 4th Ave Music Stage	entertainment
3	Tucson International Mariachi	entertainment
gap	Bowling, Pinball Arcade, Bounce House	recreation
1	Tucson Greyhound Park - gaming	recreation
2	Salvation Army Corps & Youth Ctr	recreation
3	Aztlan Boxing Gym	recreation
4	Mancave Billiard Club	recreation
gap	Music Teachers, Instructors	performing arts
1	Alvarado Music Co, machine supplier	performing arts
2	Ballet Folklorico Tapatio, dance school	performing arts
3	Dancing in the Streets AZ, ballet school	performing arts
gap	Art Gallery with Kiosks	artisan
gap	Alterations, sewing, beading	artisan
1	Indigenous Alliance	artisan
2	Joanna's Healing Arts personal care	artisan
3	Galeria Mitotera - local artisans	artisan
4	Marcela Norr Gift Shop	artisan

Source: Based on a desk-top inventory and assessment of established businesses. Analysis and exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; 2021.

Existing Businesses by General Category

The City of South Tucson, Arizona | February 2020

Count	Description of Retail Opportunity	General Category
Existing		
gap	Family Apparel, Rugged Wear for Men	apparel
1	Casa Lee clothing store	apparel
2	Sunnyside Shades Fashions	apparel
3	Tanline Printing - screen print	apparel
4	Preloved Chica Clothing	apparel - consignment
5	Gold & Diamond Jewelry	apparel - accessories
1	Creatista Film, Video, Photography	photography services
2	MHJ Photography Services	photography services
3	Zoom Photo & Video	photography services
4	Walgreens Photo	photography services
1	Pancho's Barber Shop	personal care
2	George's Barbershop	personal care
3	Look Within Studio	personal care
4	Salon La Paloma	personal care
5	Lourdes Beauty Salon	personal care
6	Casa de Nails	personal care

Source: Based on a desk-top inventory and assessment of established businesses. Analysis and exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; 2021.

Existing Businesses by General Category
 The City of South Tucson, Arizona | February 2020

Count	Description of Retail Opportunity	General Category
Existing		
gap	Ready-to-Assemble Furniture	home furnishings
1	Royal Prestige Arizona - cookware	home furnishings
2	Citywide Supply home goods	home furnishings
3	Rent-A-Center	home furnishings
1	A1 Mattress	mattresses
2	Spring Pedic Mattress	mattresses
gap	Furniture Restoration, Re-upholstery	used merchandise
gap	Auction House	used merchandise
1	Jeff Oatman Antique Store	used merchandise
2	Liberty Pawn Shop	used merchandise
3	Pawn 1st	used merchandise
gap	Toys, Games, Comics, Collectibles	toys and hobby
gap	Play it Again sports equipment	sporting goods
1	Bike Shop	sporting goods
1	Arizona Small Animal Clinic	pet care
2	Arizona Feeds Country Store	pet supply

Source: Based on a desk-top inventory and assessment of established businesses. Analysis and exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; 2021.

Existing Businesses by General Category

The City of South Tucson, Arizona | February 2020

Count	Description of Retail Opportunity	General Category
Existing		
gap	Christian / Catholic Book Store	media
1	South Tucson Library	media
2	Arizona Hispana newstand	media
1	Tuc Tech Biz computer repair	office supplies
2	Gloo Factory printing	office supplies
3	United States Post Office	office supplies
1	Cricket Wireless Retailer	telecommunications
2	Metro by T-Mobile cell phone	telecommunications
3	T-Mobile cell phones	telecommunications
gap	Lighting and Electrical Supply Store	home improvement
1	Tucson Rolling Shutters Screens store	home improvement
2	Re-Paints paint store	home improvement
3	Greco Painting Inc services	home improvement
4	R S Herder Corp - flooring store	home improvement
5	A Handyman's Haven	home improvement
6	A-S Plumbing Specialties	home improvement
1	A&S Paving	construction
2	Air Conditioning & Heating	construction
3	Border Traffic Safety	construction
4	Borderland Construction	construction
5	Milgard Windows & Doors	construction
6	SealMaster	construction
7	Signal Gates, fences	construction
8	Source One Displays, Signs	construction
9	Window Depot	construction

Source: Based on a desk-top inventory and assessment of established businesses. Analysis and exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; 2021.

Existing Businesses by General Category

The City of South Tucson, Arizona | February 2020

Count	Description of Retail Opportunity	General Category
Existing		
1	Morales Office of Law	attorneys, lawyers
1	Oxford Realty Advisors	real estate brokers
1	Sonora Title & Registration	title agencies
2	R & A Title Services	title agencies
1	AALL Insurance	insurance services
2	Estrella Insurance	insurance services
3	Mike Pierce Insurance	insurance services
4	Choice Insurance	insurance services
5	Javier Alvarez Insurance	insurance services
1	Arizona Motel	overnight accommodations
2	El Camino Motel	overnight accommodations
3	Friends Place	overnight accommodations
4	MinaH MinaH	overnight accommodations
5	Paradise Inn	overnight accommodations
6	Sixth Ave Suites	overnight accommodations
7	Star Motel	overnight accommodations
1	Chase Bank	Bank
2	Million Dollar Bank	Bank
3	Washington Federal Bank	Bank
1	ACE Cash Express	financial services
2	Cash Time Loan Centers	financial services
3	Loanmaz Title Loans	financial services
4	TitleMax Title Loans	financial services
5	Western Union	financial services
1	Jackson Hewitt Tax Service	Tax Services
2	TaxPros Tax Services	Tax Services
3	Liberty Tax Service	Tax Services

Source: Based on a desk-top inventory and assessment of established businesses. Analysis and exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; 2021.

Existing Businesses by General Category

The City of South Tucson, Arizona | February 2020

Count	Description of Retail Opportunity	General Category
gap	Motorcycles, motorsports	dealership
1	AAA Motors Used Auto Sales	used car dealership
2	C & C Auto Sales	used car dealership
3	Choice Motor	used car dealership
4	J and A Auto Sales	used car dealership
5	New Way Auto Sales	used car dealership
6	R & S Auto Sales	used car dealership
7	Salem Auto Sales	used car dealership
8	Tucson Wholesale Auto	used car dealership
gap	Automotive Stereo Equipment	auto parts
1	AutoZone Auto Parts	auto parts
2	Chris' Auto & Tire Shop	auto parts
3	Daniels Tire Shop	auto parts
4	Goodman Used Tire & Tube	auto parts
5	J & V Auto Parts, Accessories	auto parts
6	Jeff's Used Auto Parts	auto parts
7	KC Auto Paint & Supplies	auto parts
8	New Way Auto Parts	auto parts
9	Presidio Auto Parts	auto parts
10	Ruiz Tire Shop	auto parts
11	Southwestern Equipment & Tire	auto parts
12	Teme's Tire Shop	auto parts

Source: Based on a desk-top inventory and assessment of established businesses. Analysis and exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; 2021.

Existing Businesses by General Category

The City of South Tucson, Arizona | February 2020

Count	Description of Retail Opportunity	General Category
Existing		
1	Ramon's Automotive	auto service
2	Twins Auto Repair	auto service
3	Vikks Paint and Body	auto service
4	520 Complete Automotive	auto service
5	American & Foreign Auto Glass	auto service
6	Baca Enterprises Upholstery	auto service
7	Big Dogs Off Road Repair	auto service
8	Buffalo Auto Repair	auto service
9	Carburetors & Fuel Injection	auto service
10	Complete Automotive Center	auto service
11	Do It To It Fluid	auto service
12	Flintstone Tire & Auto Care	auto service
13	Frank's Auto Refinishing	auto service
14	Johnny's Auto Collision	auto service
15	Lions Autorepair & Performance	auto service
16	McElroy's Auto Repair	auto service
17	Meineke Car Care Center	auto service
18	Old Pueblo Truck Body Repair	auto service
19	Pinkys Auto Refinishing	auto service
20	R & S Auto Repair Paint Body	auto service
21	Ricks Collision & Refinishing	auto service
22	Srgio's Paint & Body Shop	auto service
23	Tamayo's Paint & Body	auto service
24	Victory Auto Body	auto service
25	VPC Auto Services	auto service
26	Oscar Mechanic	auto service

Source: Based on a desk-top inventory and assessment of established businesses. Analysis and exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; 2021.

Existing Businesses by General Category

The City of South Tucson, Arizona | February 2020

Count	Description of Retail Opportunity	General Category
Existing		
1	Fresenius Kidney Care	health care
2	Health Care Southwest	health care
3	Tucson Community Acupuncture	health care
4	Amy E. Copfer, PharmD	health care
5	Dr Wen Hui Cai, MD	health care
6	Health IDA M	health care
7	Dorsett Dentistry & Braces	health care
8	Sandra Gallegos-Soslowsky	health care
9	Risas Dental & Braces	health care
1	Alliance for Global Justice	social services
2	Casa De Rosa home health care	social services
3	DCS Child Care Agency	social services
4	Derechos Humanos	social services
5	La Frontera Center	social services
6	Las Artes Youth Art Program	social services
7	Marine Corps League	social services
8	Nicaragua Network	social services
9	Primavera Foundation	social services
10	Ser Jobs for Progress	social services
11	Social Security Office	social services
12	South Tucson Housing Authority	social services
13	Sullivan Jackson Employment Ctr	social services
14	YWCA House of Neighborly Service	social services

Source: Based on a desk-top inventory and assessment of established businesses. Analysis and exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; 2021.

Existing Businesses by General Category

The City of South Tucson, Arizona | February 2020

Count	Description of Retail Opportunity	General Category
Existing		
1	3 Speed Auto Brandon Shilling	manufacturing
2	Desert West Vending & Mnfg	manufacturing
3	Helicon Thin Film Systems	manufacturing
4	Inch by Inch Worm Castings	manufacturing
5	Mikey Block	manufacturing
6	Precision Stainless Mnfg	manufacturing
7	R & R Steel Fabrication	manufacturing
8	Signal Doors	manufacturing
9	Stewardt Boot Mnfg	manufacturing
10	TransChem Environmental	manufacturing
1	CubeSmart Self Storage	storage
1	Gracia's Shuttles	transportation
1	Martinez Funeral Chapels	funeral services

Source: Based on a desk-top inventory and assessment of established businesses. Analysis and exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; 2021.

Section B

Derivation of Sales per Establishment | 2017

The City of South Tucson and Comparative Places

Geography	NAICS Code	Sales or Revenues (\$Mil.)	Number of Estab.	Sales per Estab. (\$Mil.)
Total Retail Trade (Aggregate)				
The State of Arizona	44-45	\$104,365.6	17918	\$5.8
Pima County AZ	44-45	\$12,230.9	2721	\$4.5
Tucson City AZ	44-45	\$8,459.9	1812	\$4.7
South Tucson City AZ	44-45	\$40.6	20	\$2.0
				Gap
Automotive parts, accessories, and tire stores				
The State of Arizona	4413	\$2,053.3	1069	\$1.9
Pima County AZ	4413	\$312.1	178	\$1.8
Tucson City AZ	4413	\$191.5	119	\$1.6
South Tucson City AZ	4413	\$9.4	3	\$3.1
Grocery stores				
The State of Arizona	4451	\$13,691.3	1127	\$12.1
Pima County AZ	4451	\$2,210.0	179	\$12.3
Tucson City AZ	4451	\$1,425.3	125	\$11.4
South Tucson City AZ	4451	.	.	.

Source: Underlying data provided by the United States Economic Census; 2017. The next economic census will be completed in 2022 with results available in 2024. Analysis and exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; March 2021.

Derivation of Sales per Establishment | 2017

The City of South Tucson and Comparative Places

Geography	NAICS Code	Sales or Revenues (\$Mil.)	Number of Estab.	Sales per Estab. (\$Mil.)	
Overnight accommodations, hotels, motels					
The State of Arizona	721	\$6,365.8	1391	\$4.6	
Pima County AZ	721	\$1,085.3	180	\$6.0	
Tucson City AZ	721	\$332.9	106	\$3.1	
South Tucson City AZ	721	.	.	.	
Restaurants and other eating places					
The State of Arizona	7225	\$12,116.9	10352	\$1.2	
Pima County AZ	7225	\$1,668.5	1500	\$1.1	
Tucson City AZ	7225	\$1,172.0	1041	\$1.1	
South Tucson City AZ	7225	\$12.7	15	\$0.8	Gap
Maintenance, including automotive repair shops					
The State of Arizona	811	\$3,330.9	4013	\$0.8	
Pima County AZ	811	\$444.9	607	\$0.7	
Tucson City AZ	811	\$284.1	401	\$0.7	
South Tucson City AZ	811	\$4.2	10	\$0.4	Gap
Arts, entertainment, and recreation					
The State of Arizona	71	\$4,812.4	2041	\$2.4	
Pima County AZ	71	\$414.5	327	\$1.3	
Tucson City AZ	71	\$153.1	165	\$0.9	
South Tucson City AZ	71	.	.	.	

Source: Underlying data provided by the United States Economic Census; 2017. The next economic census will be completed in 2022 with results available in 2024. Analysis and exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; March 2021.

Section C

Derivation of Sales per Capita | 2017

The City of South Tucson and Comparative Places

Geography	NAICS Code	Sales or Revenues (\$Mil.)	Population (#)	Sales per Capita (\$)
Total Retail Trade (Aggregate)				
The State of Arizona	44-45	\$104,365.6	7,050,299	\$14,803
Pima County AZ	44-45	\$12,230.9	1,027,207	\$11,907
Tucson City AZ	44-45	\$8,459.9	541,482	\$15,624
South Tucson City AZ	44-45	\$40.6	5,667	\$7,158
				Gap
Automotive parts, accessories, and tire stores				
The State of Arizona	4413	\$2,053.3	7,050,299	\$291
Pima County AZ	4413	\$312.1	1,027,207	\$304
Tucson City AZ	4413	\$191.5	541,482	\$354
South Tucson City AZ	4413	\$9.4	5,667	\$1,660
Grocery stores				
The State of Arizona	4451	\$13,691.3	7,050,299	\$1,942
Pima County AZ	4451	\$2,210.0	1,027,207	\$2,151
Tucson City AZ	4451	\$1,425.3	541,482	\$2,632
South Tucson City AZ	4451	.	5,667	.

Source: Underlying data provided by the United States Economic Census; 2017. The next economic census will be completed in 2022 with results available in 2024. Analysis and exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; March 2021.

Derivation of Sales per Capita | 2017

The City of South Tucson and Comparative Places

Geography	NAICS Code	Sales or Revenues (\$Mil.)	Population (#)	Sales per Capita (\$)
Overnight accommodations, hotels, motels				
The State of Arizona	721	\$6,365.8	7,050,299	\$903
Pima County AZ	721	\$1,085.3	1,027,207	\$1,057
Tucson City AZ	721	\$332.9	541,482	\$615
South Tucson City AZ	721	.	5,667	.
Restaurants and other eating places				
The State of Arizona	7225	\$12,116.9	7,050,299	\$1,719
Pima County AZ	7225	\$1,668.5	1,027,207	\$1,624
Tucson City AZ	7225	\$1,172.0	541,482	\$2,164
South Tucson City AZ	7225	\$12.7	5,667	\$2,233
Maintenance, including automotive repair shops				
The State of Arizona	811	\$3,330.9	7,050,299	\$472
Pima County AZ	811	\$444.9	1,027,207	\$433
Tucson City AZ	811	\$284.1	541,482	\$525
South Tucson City AZ	811	\$4.2	5,667	\$749
Arts, entertainment, and recreation				
The State of Arizona	71	\$4,812.4	7,050,299	\$683
Pima County AZ	71	\$414.5	1,027,207	\$404
Tucson City AZ	71	\$153.1	541,482	\$283
South Tucson City AZ	71	.	5,667	.

Source: Underlying data provided by the United States Economic Census; 2017. The next economic census will be completed in 2022 with results available in 2024. Analysis and exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; March 2021.

Section D

Derivation of Market Share | 2017

The City of South Tucson and Comparative Places

Geography	NAICS Code	Sales or Revenues (\$Mil.)	Total Personal Inc. (\$Mil.)	Market Share (%)
Total Retail Trade (Aggregate)				
The State of Arizona	44-45	\$104,365.6	\$216,401.9	48.2%
Pima County AZ	44-45	\$12,230.9	\$30,515.2	40.1%
Tucson City AZ	44-45	\$8,459.9	\$12,808.8	66.0%
South Tucson City AZ	44-45	\$40.6	\$71.5	56.7%
Automotive parts, accessories, and tire stores				
The State of Arizona	4413	\$2,053.3	\$216,401.9	0.9%
Pima County AZ	4413	\$312.1	\$30,515.2	1.0%
Tucson City AZ	4413	\$191.5	\$12,808.8	1.5%
South Tucson City AZ	4413	\$9.4	\$71.5	13.2%
Grocery stores				
The State of Arizona	4451	\$13,691.3	\$216,401.9	6.3%
Pima County AZ	4451	\$2,210.0	\$30,515.2	7.2%
Tucson City AZ	4451	\$1,425.3	\$12,808.8	11.1%
South Tucson City AZ	4451	.	\$71.5	.

Source: Underlying data provided by the United States Economic Census; 2017. The next economic census will be completed in 2022 with results available in 2024. Analysis and exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; March 2021.

Derivation of Market Share | 2017

The City of South Tucson and Comparative Places

Geography	NAICS Code	Sales or Revenues (\$Mil.)	Total Personal Inc. (\$Mil.)	Market Share (%)
Overnight accommodations, hotels, motels				
The State of Arizona	721	\$6,365.8	\$216,401.9	2.9%
Pima County AZ	721	\$1,085.3	\$30,515.2	3.6%
Tucson City AZ	721	\$332.9	\$12,808.8	2.6%
South Tucson City AZ	721	.	\$71.5	.
Restaurants and other eating places				
The State of Arizona	7225	\$12,116.9	\$216,401.9	5.6%
Pima County AZ	7225	\$1,668.5	\$30,515.2	5.5%
Tucson City AZ	7225	\$1,172.0	\$12,808.8	9.1%
South Tucson City AZ	7225	\$12.7	\$71.5	17.7%
Maintenance, including automotive repair shops				
The State of Arizona	811	\$3,330.9	\$216,401.9	1.5%
Pima County AZ	811	\$444.9	\$30,515.2	1.5%
Tucson City AZ	811	\$284.1	\$12,808.8	2.2%
South Tucson City AZ	811	\$4.2	\$71.5	5.9%
Arts, entertainment, and recreation				
The State of Arizona	71	\$4,812.4	\$216,401.9	2.2%
Pima County AZ	71	\$414.5	\$30,515.2	1.4%
Tucson City AZ	71	\$153.1	\$12,808.8	1.2%
South Tucson City AZ	71	.	\$71.5	.

Source: Underlying data provided by the United States Economic Census; 2017. The next economic census will be completed in 2022 with results available in 2024. Analysis and exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; March 2021.

Section E

Derivation of Jobs per Capita | 2017

The City of South Tucson and Comparative Places

Geography	NAICS Code	Number of Employees	Population (#)	Employees per Capita	GAP Number of New Jobs
Total Retail Trade (Aggregate)					
The State of Arizona	44-45	324,912	7,050,299	4.6%	.
Pima County AZ	44-45	46,749	1,027,207	4.6%	.
Tucson City AZ	44-45	32,262	541,482	6.0%	.
South Tucson City AZ	44-45	206	5,667	3.6%	55
Automotive parts, accessories, and tire stores					
The State of Arizona	4413	11,306	7,050,299	0.2%	.
Pima County AZ	4413	1,673	1,027,207	0.2%	.
Tucson City AZ	4413	1,134	541,482	0.2%	.
South Tucson City AZ	4413	39	5,667	0.7%	.
Grocery stores					
The State of Arizona	4451	51,621	7,050,299	0.7%	.
Pima County AZ	4451	8,454	1,027,207	0.8%	.
Tucson City AZ	4451	5,366	541,482	1.0%	.
South Tucson City AZ	4451	60	5,667	1.1%	.

Source: Underlying data provided by the United States Economic Census; 2017. The next economic census will be completed in 2022 with results available in 2024. Analysis and exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; March 2021.

Derivation of Jobs per Capita | 2017

The City of South Tucson and Comparative Places

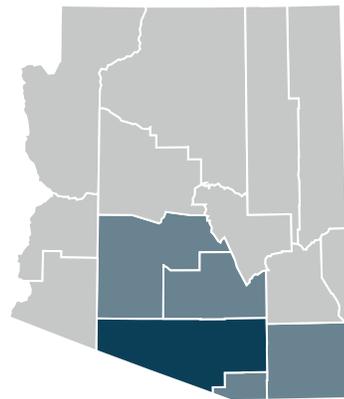
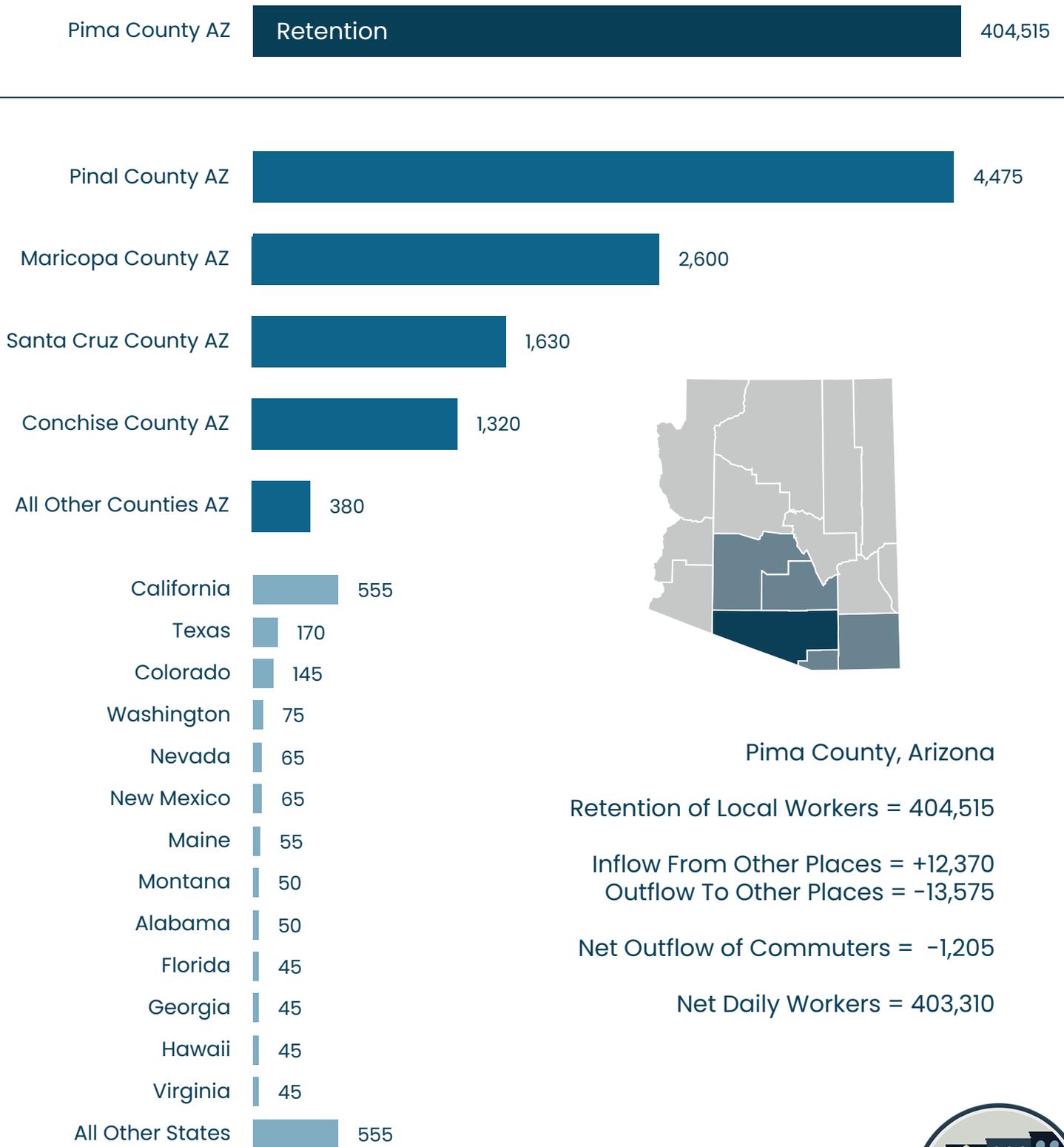
Geography	NAICS Code	Number of Employees	Population (#)	Employees per Capita	GAP Number of New Jobs
Overnight accommodations, hotels, motels					
The State of Arizona	721	54,963	7,050,299	0.8%	.
Pima County AZ	721	9,535	1,027,207	0.9%	.
Tucson City AZ	721	3,706	541,482	0.7%	.
South Tucson City AZ	721	10	5,667	0.2%	34
Restaurants and other eating places					
The State of Arizona	7225	222,006	7,050,299	3.1%	.
Pima County AZ	7225	32,711	1,027,207	3.2%	.
Tucson City AZ	7225	22,472	541,482	4.2%	.
South Tucson City AZ	7225	281	5,667	5.0%	.
Maintenance, including automotive repair shops					
The State of Arizona	811	25,735	7,050,299	0.4%	.
Pima County AZ	811	3,884	1,027,207	0.4%	.
Tucson City AZ	811	2,488	541,482	0.5%	.
South Tucson City AZ	811	42	5,667	0.7%	.
Arts, entertainment, and recreation					
The State of Arizona	71	47,060	7,050,299	0.7%	.
Pima County AZ	71	6,784	1,027,207	0.7%	.
Tucson City AZ	71	2,921	541,482	0.5%	.
South Tucson City AZ	71	60	5,667	1.1%	.

Source: Underlying data provided by the United States Economic Census; 2017. The next economic census will be completed in 2022 with results available in 2024. Analysis and exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; March 2021.

Section F

Commuter In-Flow | Pima County

Origins of local workers reported as commuting into the county in 2015.



Pima County, Arizona

Retention of Local Workers = 404,515

Inflow From Other Places = +12,370

Outflow To Other Places = -13,575

Net Outflow of Commuters = -1,205

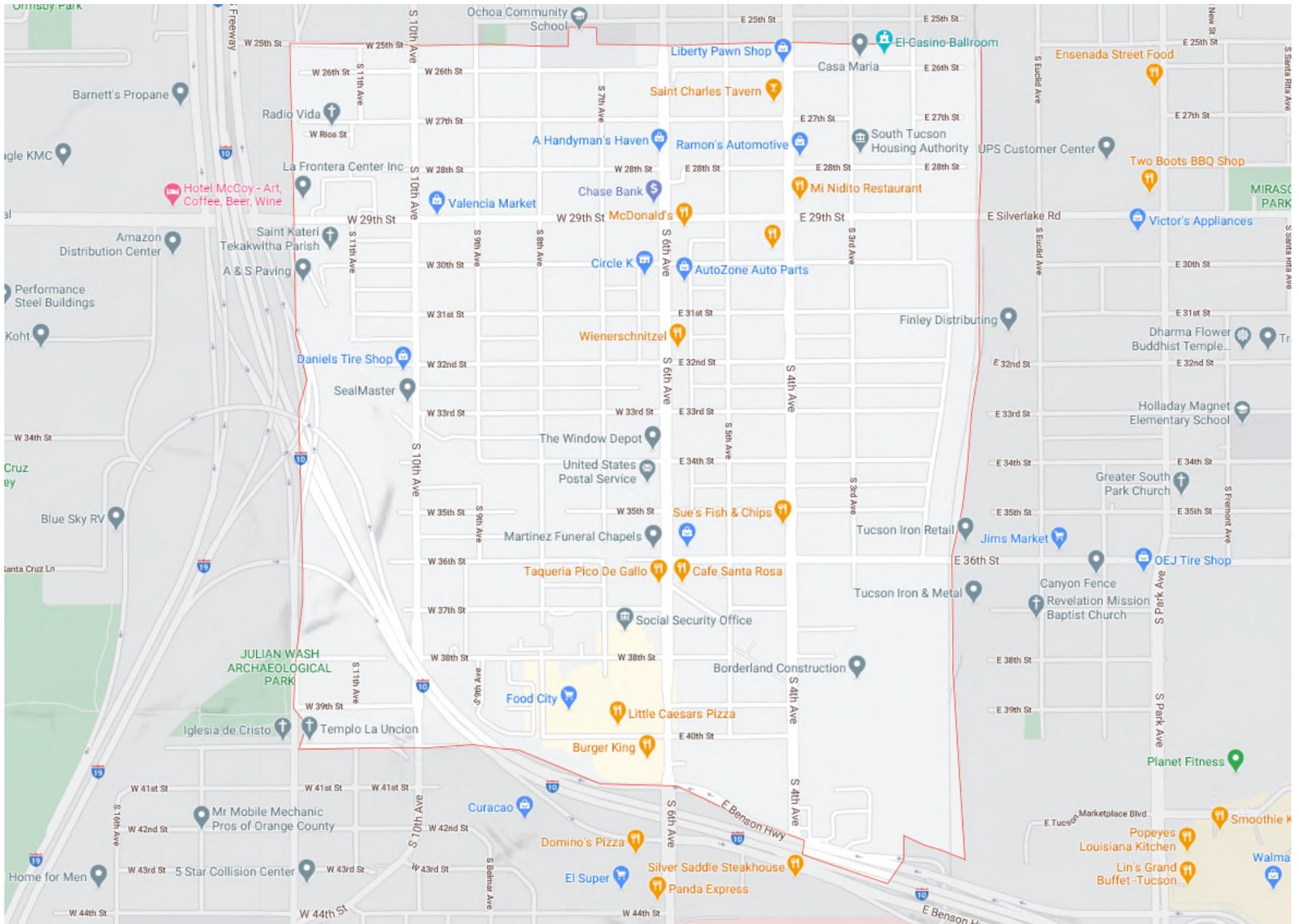
Net Daily Workers = 403,310

Underlying data by the American Community Survey with 5-year estimates through 2015. Analysis and exhibit prepared by LandUseUSA | Urban Strategies in collaboration with the Incremental Development Alliance; 2021.

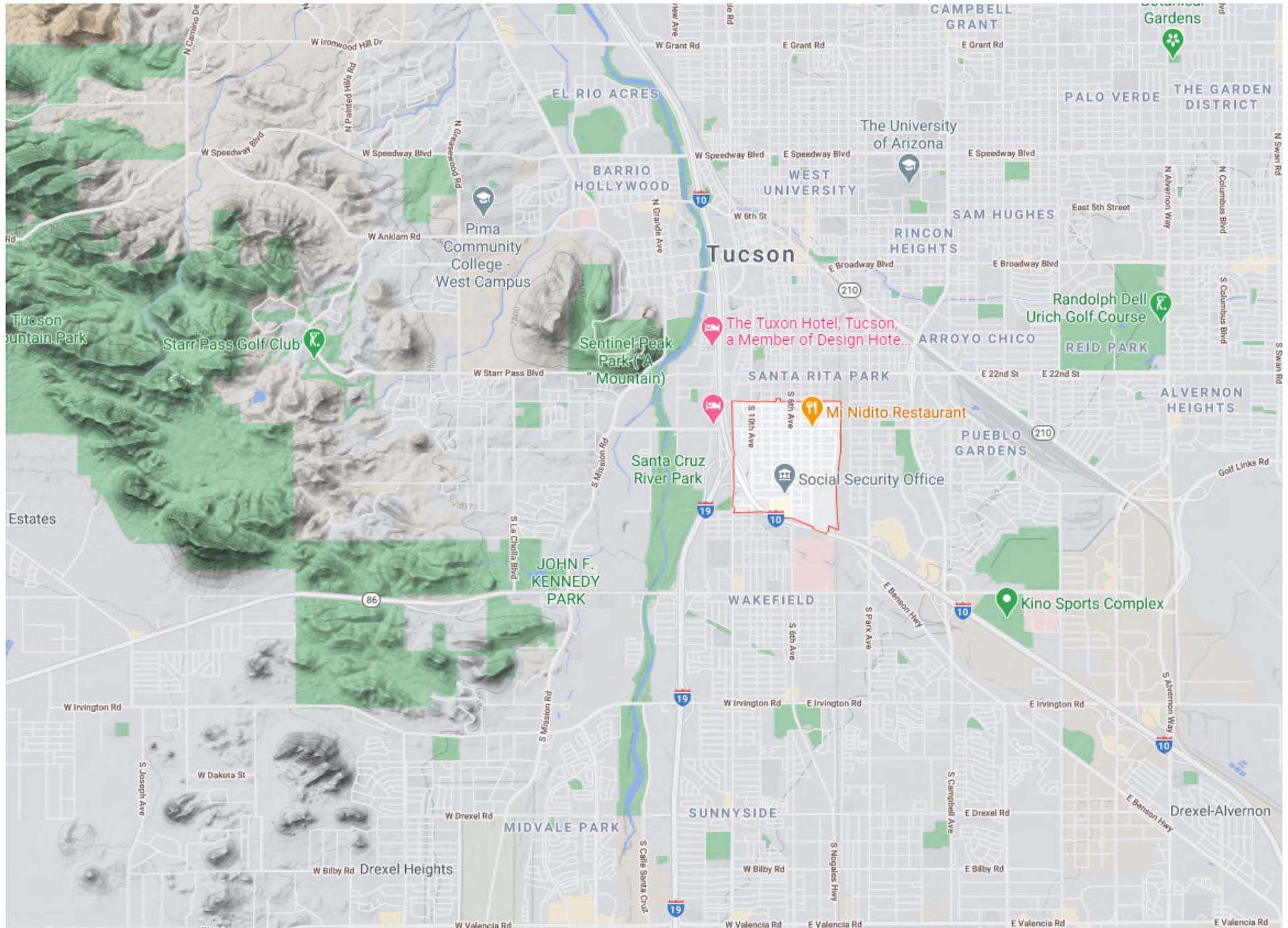


Section G

The City of South Tucson, Arizona



The City of South Tucson, Arizona



Retail Market Parameters The City of South Tucson, Arizona

Population by Age	2000 Census	2000 Share	2010 Census	2010 Share	2020 Estimates	2020 Share	2025 Projections	2025 Share
0 to 4	490	9%	488	9%	455	8%	453	8%
5 to 14	986	18%	907	16%	938	16%	946	16%
15 to 19	340	6%	490	9%	434	7%	411	7%
20 to 24	398	7%	389	7%	501	9%	479	8%
25 to 34	773	14%	727	13%	760	13%	801	14%
35 to 44	818	15%	715	13%	714	12%	712	12%
45 to 54	639	12%	732	13%	687	12%	671	11%
55 to 64	562	10%	587	10%	589	10%	602	10%
65 to 74	248	5%	381	7%	464	8%	486	8%
75 to 84	211	4%	176	3%	214	4%	258	4%
85+	<u>31</u>	<u>1%</u>	<u>55</u>	<u>1%</u>	<u>67</u>	<u>1%</u>	<u>80</u>	<u>1%</u>
Total Population	5,496	100%	5,647	100%	5,823	100%	5,899	100%
Median Age	32	.	32	.	32	.	33	.
Seasonal Population	54	1%	56	1%	58	1%	58	1%

Source: Underlying data provided by the 2000 and 2010 US Census and American Community Survey through 2019. Analysis, projections, and exhibit prepared by LandUseUSA | Urban Strategies; 2021.

Retail Market Parameters The City of South Tucson, Arizona

	2000 Census	2000 Share	2010 Census	2010 Share	2020 Estimates	2020 Share	2025 Projections	2025 Share
Educational Attainment								
Grade K - 8	888	27%	821	24%	630	18%	640	18%
Grade 9 - 11	841	26%	553	16%	640	18%	667	18%
High School Graduate	710	22%	824	24%	1,035	30%	1,081	30%
Some College, No Degree	401	12%	558	17%	672	19%	698	19%
Associates Degree	107	3%	168	5%	164	5%	169	5%
Bachelor's Degree	69	2%	114	3%	105	3%	106	3%
Graduate Degree	52	2%	36	1%	39	1%	42	1%
No Schooling	<u>208</u>	<u>6%</u>	<u>299</u>	<u>9%</u>	<u>210</u>	<u>6%</u>	<u>207</u>	<u>6%</u>
Age 25+ Population	3,276	100%	3,373	100%	3,495	100%	3,610	100%
Some College or a Degree	629	19%	876	26%	980	28%	1,015	28%

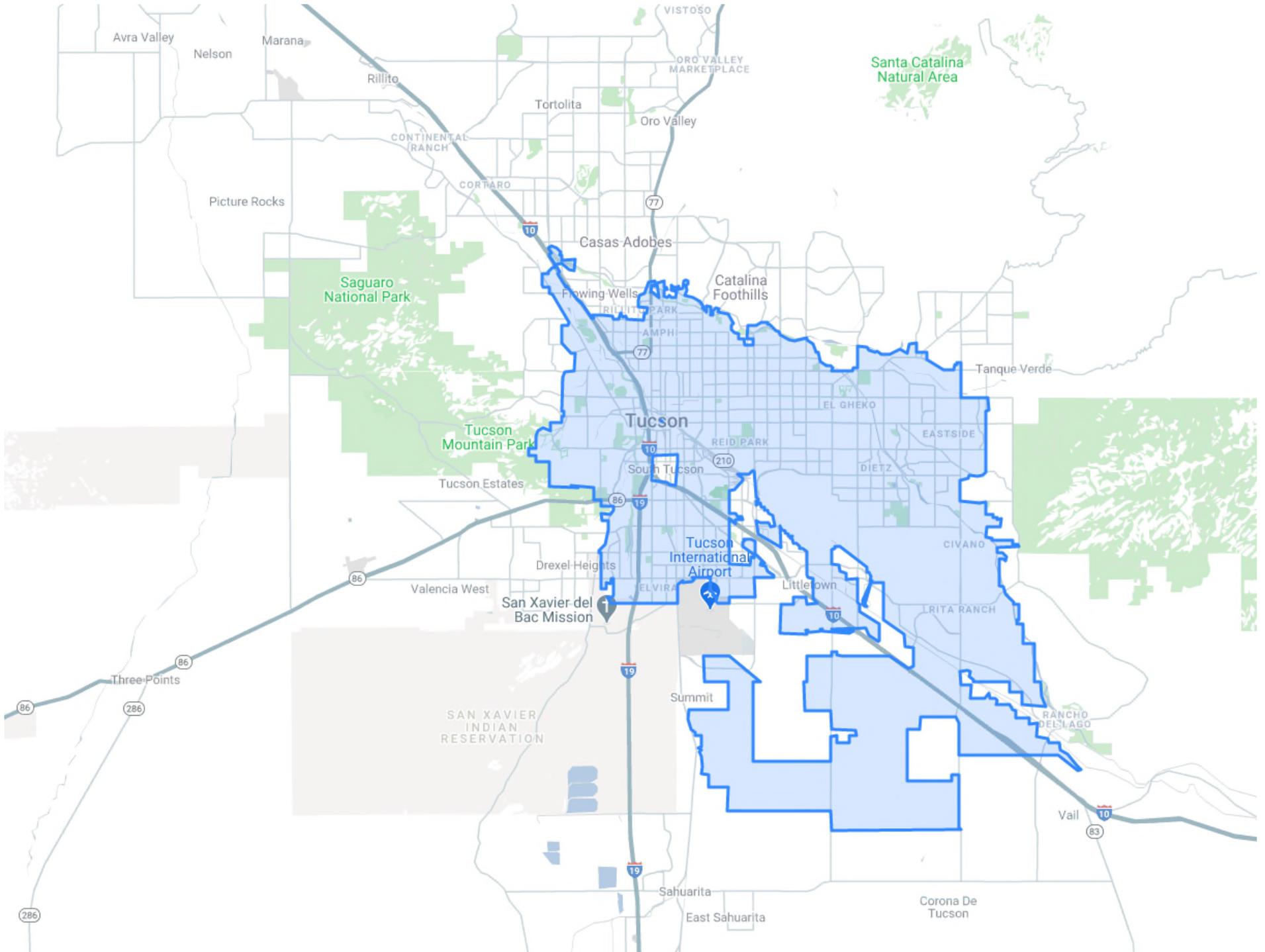
Source: Underlying data provided by the 2000 and 2010 US Census and American Community Survey through 2019. Analysis, projections, and exhibit prepared by LandUseUSA | Urban Strategies; 2021.

Retail Market Parameters The City of South Tucson, Arizona

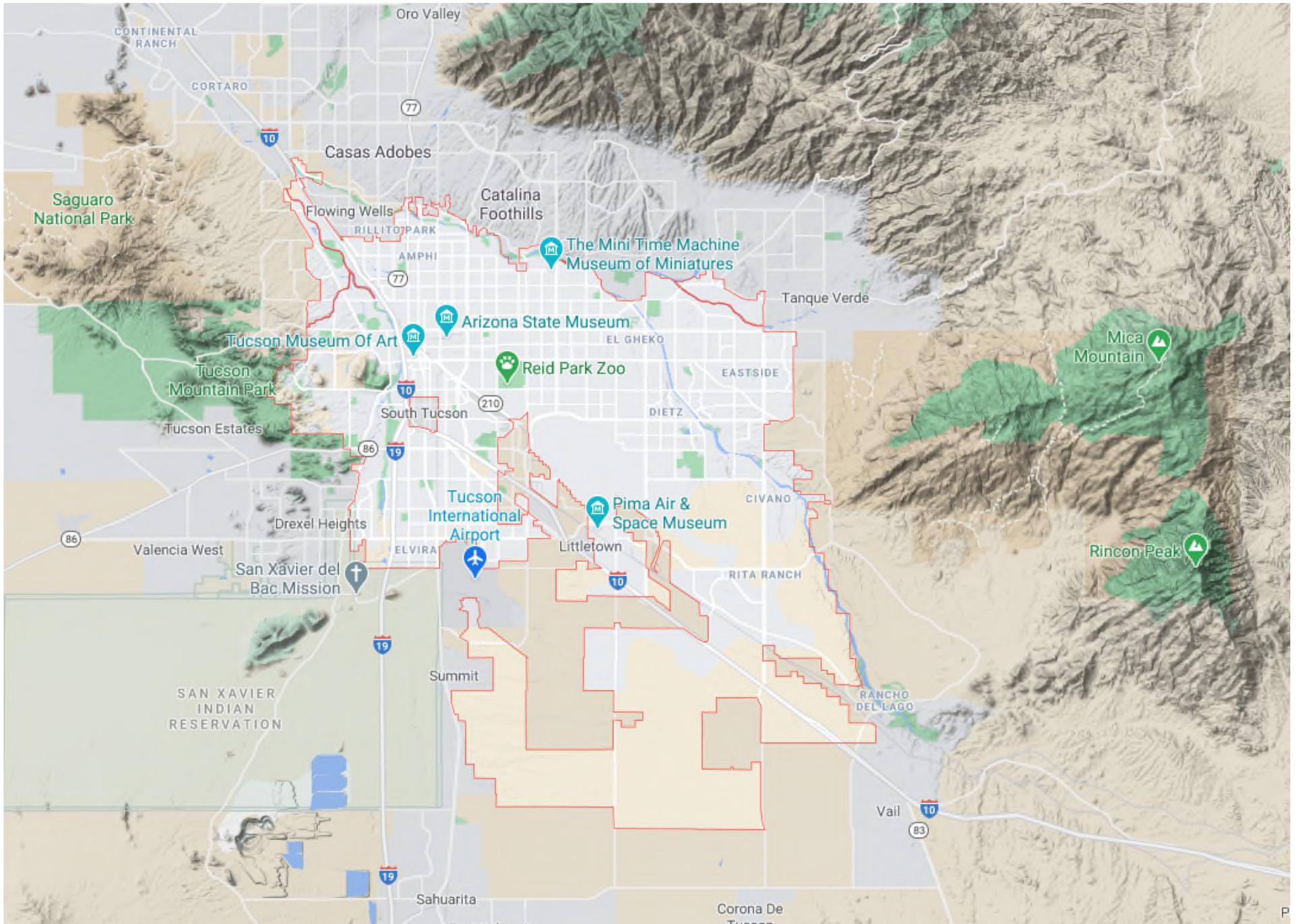
	2000 Census	2000 Share	2010 Census	2010 Share	2020 Estimates	2020 Share	2025 Projections	2025 Share
Employment								
Civilian, Employed	1,693	82%	1,686	78%	1,982	89%	2,001	88%
Civilian, Unemployed	368	18%	480	22%	246	11%	262	12%
In Armed Forces	<u>10</u>	<u>0%</u>	<u>5</u>	<u>0%</u>	<u>5</u>	<u>0%</u>	<u>5</u>	<u>0%</u>
Total Labor Force Ages 16+	2,071	100%	2,171	100%	2,233	100%	2,268	100%
In the Labor Force	2,071	52%	2,171	52%	2,233	51%	2,268	51%
Not In Labor Force	<u>1,901</u>	<u>48%</u>	<u>1,981</u>	<u>48%</u>	<u>2,111</u>	<u>49%</u>	<u>2,143</u>	<u>49%</u>
Total Population Ages 16+	3,972	100%	4,152	100%	4,344	100%	4,411	100%
Blue Collar Workers	1,052	62%	1,242	74%	1,432	72%	1,449	72%
White Collar Workers	<u>653</u>	<u>38%</u>	<u>444</u>	<u>26%</u>	<u>550</u>	<u>28%</u>	<u>552</u>	<u>28%</u>
Total Labor Force Ages 16+	1,705	100%	1,686	100%	1,982	100%	2,001	100%
Per Capita Income	\$8,197	.	\$9,721	.	\$11,516	.	\$13,445	.

Source: Underlying data provided by the 2000 and 2010 US Census and American Community Survey through 2019. Analysis, projections, and exhibit prepared by LandUseUSA | Urban Strategies; 2021.

The City of Tucson, Arizona



The City of Tucson, Arizona



Retail Market Parameters The City of Tucson, Arizona

	2000 Census	2000 Share	2010 Census	2010 Share	2020 Estimates	2020 Share	2025 Projections	2025 Share
Population by Age								
0 to 4	34,308	7%	35,845	7%	34,017	6%	34,734	6%
5 to 14	66,952	14%	65,568	13%	65,653	12%	66,045	12%
15 to 19	36,795	8%	42,079	8%	38,972	7%	37,721	7%
20 to 24	46,207	10%	52,434	10%	58,863	11%	52,579	9%
25 to 34	74,332	15%	77,413	15%	82,972	15%	88,125	16%
35 to 44	73,193	15%	63,137	12%	65,705	12%	68,556	12%
45 to 54	57,022	12%	66,545	13%	58,387	11%	57,365	10%
55 to 64	35,315	7%	55,352	11%	59,387	11%	57,194	10%
65 to 74	29,556	6%	32,270	6%	44,261	8%	48,582	9%
75 to 84	21,551	4%	20,914	4%	25,078	5%	29,939	5%
85+	<u>7,185</u>	<u>1%</u>	<u>9,378</u>	<u>2%</u>	<u>11,761</u>	<u>2%</u>	<u>12,912</u>	<u>2%</u>
Total Population	482,417	100%	520,934	100%	545,056	100%	553,752	100%
Median Age	33	.	33	.	34	.	35	.
Seasonal Population	10,430	2%	11,263	2%	11,785	2%	11,973	2%

Source: Underlying data provided by the 2000 and 2010 US Census and American Community Survey through 2019. Analysis, projections, and exhibit prepared by LandUseUSA | Urban Strategies; 2021.

Retail Market Parameters The City of Tucson, Arizona

	2000 Census	2000 Share	2010 Census	2010 Share	2020 Estimates	2020 Share	2025 Projections	2025 Share
Educational Attainment								
Grade K - 8	19,004	6%	20,062	6%	16,763	5%	17,195	5%
Grade 9 - 11	34,616	12%	28,699	9%	31,398	9%	32,876	9%
High School Graduate	71,378	24%	76,565	24%	82,491	24%	86,016	24%
Some College, No Degree	79,632	27%	87,218	27%	89,384	26%	92,885	26%
Associates Degree	19,778	7%	24,117	7%	29,695	9%	31,375	9%
Bachelor's Degree	41,538	14%	50,113	15%	55,497	16%	58,035	16%
Graduate Degree	27,229	9%	33,830	10%	37,443	11%	39,175	11%
No Schooling	<u>4,595</u>	<u>2%</u>	<u>4,405</u>	<u>1%</u>	<u>4,878</u>	<u>1%</u>	<u>5,116</u>	<u>1%</u>
Age 25+ Population	297,769	100%	325,008	100%	347,551	100%	362,673	100%
Some College or a Degree	168,177	56%	195,278	60%	212,020	61%	221,470	61%

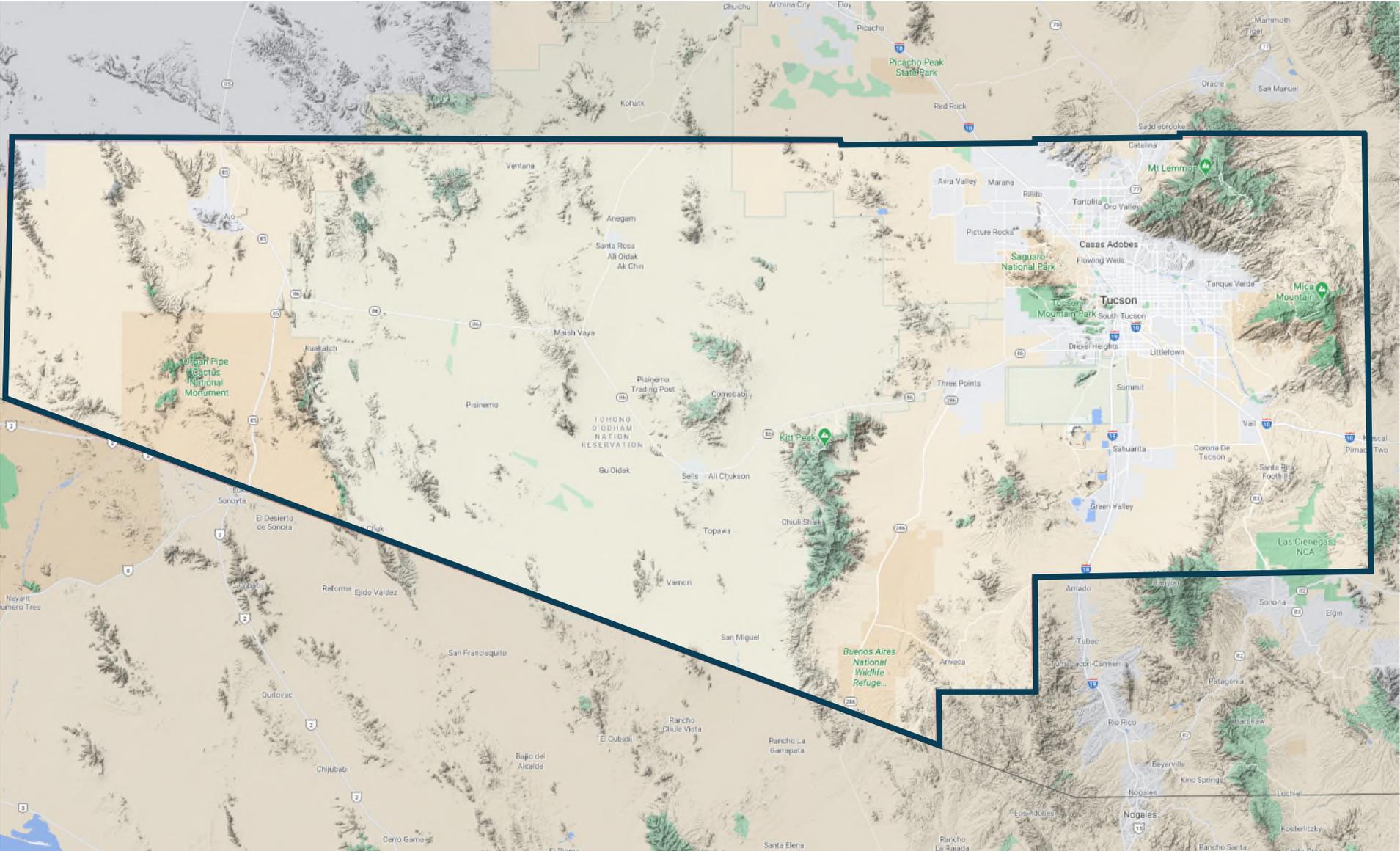
Source: Underlying data provided by the 2000 and 2010 US Census and American Community Survey through 2019. Analysis, projections, and exhibit prepared by LandUseUSA | Urban Strategies; 2021.

Retail Market Parameters The City of Tucson, Arizona

	2000 Census	2000 Share	2010 Census	2010 Share	2020 Estimates	2020 Share	2025 Projections	2025 Share
Employment								
Civilian, Employed	216,368	92%	226,797	89%	257,035	94%	260,751	94%
Civilian, Unemployed	13,658	6%	25,024	10%	12,410	5%	13,305	5%
In Armed Forces	<u>4,332</u>	<u>2%</u>	<u>3,790</u>	<u>1%</u>	<u>4,201</u>	<u>2%</u>	<u>4,335</u>	<u>2%</u>
Total Labor Force Ages 16+	234,359	100%	255,611	100%	273,646	100%	278,390	100%
In the Labor Force	234,359	62%	255,611	62%	273,646	62%	278,390	62%
Not In Labor Force	<u>140,928</u>	<u>38%</u>	<u>157,409</u>	<u>38%</u>	<u>165,308</u>	<u>38%</u>	<u>168,268</u>	<u>38%</u>
Total Population Ages 16+	375,286	100%	413,020	100%	438,954	100%	446,658	100%
Blue Collar Workers	81,286	38%	98,555	43%	111,433	43%	112,831	43%
White Collar Workers	<u>135,015</u>	<u>62%</u>	<u>128,242</u>	<u>57%</u>	<u>145,602</u>	<u>57%</u>	<u>147,919</u>	<u>57%</u>
Total Labor Force Ages 16+	216,301	100%	226,797	100%	257,035	100%	260,751	100%
Per Capita Income	\$16,123	.	\$20,394	.	\$24,192	.	\$27,918	.

Source: Underlying data provided by the 2000 and 2010 US Census and American Community Survey through 2019. Analysis, projections, and exhibit prepared by LandUseUSA | Urban Strategies; 2021.

Pima County, Arizona



Retail Market Parameters Pima County, Arizona

	2000 Census	2000 Share	2010 Census	2010 Share	2020 Estimates	2020 Share	2025 Projections	2025 Share
Population by Age								
0 to 4	54,822	7%	62,521	6%	59,306	6%	61,828	6%
5 to 14	118,354	14%	123,902	13%	122,752	12%	122,677	11%
15 to 19	60,669	7%	71,344	7%	69,664	7%	67,814	6%
20 to 24	63,199	7%	75,340	8%	91,237	9%	85,057	8%
25 to 34	113,366	13%	126,173	13%	134,166	13%	144,632	13%
35 to 44	129,294	15%	115,795	12%	119,609	11%	124,126	11%
45 to 54	110,512	13%	131,528	13%	115,265	11%	113,511	10%
55 to 64	73,536	9%	122,367	12%	130,811	12%	125,415	12%
65 to 74	63,260	7%	81,792	8%	117,549	11%	129,284	12%
75 to 84	43,676	5%	49,606	5%	63,809	6%	79,181	7%
85+	<u>13,037</u>	<u>2%</u>	<u>19,895</u>	<u>2%</u>	<u>25,708</u>	<u>2%</u>	<u>28,748</u>	<u>3%</u>
Total Population	843,726	100%	980,264	100%	1,049,878	100%	1,082,275	100%
Median Age	36	.	38	.	39	.	40	.
Seasonal Population	36,945	4%	42,924	4%	45,973	4%	47,391	4%

Source: Underlying data provided by the 2000 and 2010 US Census and American Community Survey through 2019. Analysis, projections, and exhibit prepared by LandUseUSA | Urban Strategies; 2021.

Retail Market Parameters Pima County, Arizona

	2000 Census	2000 Share	2010 Census	2010 Share	2020 Estimates	2020 Share	2025 Projections	2025 Share
Educational Attainment								
Grade K - 8	28,429	5%	29,072	4%	25,164	4%	26,068	3%
Grade 9 - 11	55,770	10%	48,214	7%	51,158	7%	53,825	7%
High School Graduate	127,340	23%	147,613	23%	159,729	23%	168,047	23%
Some College, No Degree	145,576	27%	173,125	27%	179,972	25%	188,935	25%
Associates Degree	36,695	7%	48,642	8%	60,240	9%	64,215	9%
Bachelor's Degree	86,744	16%	113,717	18%	129,134	18%	136,396	18%
Graduate Degree	59,348	11%	80,047	12%	93,371	13%	98,723	13%
No Schooling	<u>6,296</u>	<u>1%</u>	<u>6,726</u>	<u>1%</u>	<u>8,149</u>	<u>1%</u>	<u>8,688</u>	<u>1%</u>
Age 25+ Population	546,199	100%	647,157	100%	706,918	100%	744,898	100%
Some College or a Degree	328,363	60%	415,531	64%	462,717	65%	488,269	66%

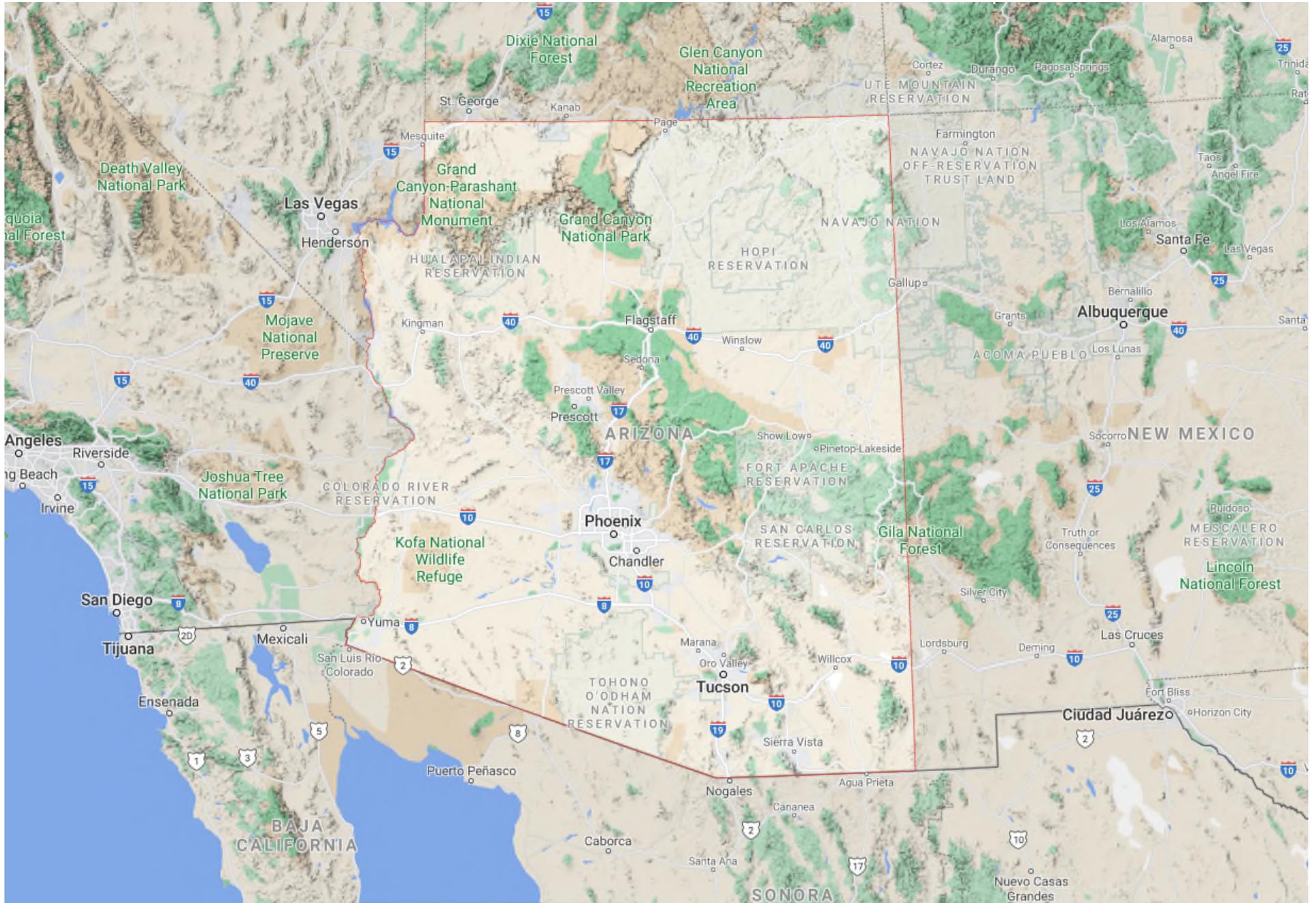
Source: Underlying data provided by the 2000 and 2010 US Census and American Community Survey through 2019. Analysis, projections, and exhibit prepared by LandUseUSA | Urban Strategies; 2021.

Retail Market Parameters Pima County, Arizona

	2000 Census	2000 Share	2010 Census	2010 Share	2020 Estimates	2020 Share	2025 Projections	2025 Share
Employment								
Civilian, Employed	370,646	93%	424,076	90%	489,670	95%	505,378	95%
Civilian, Unemployed	20,912	5%	40,414	9%	20,691	4%	22,586	4%
In Armed Forces	<u>5,462</u>	<u>1%</u>	<u>4,821</u>	<u>1%</u>	<u>5,293</u>	<u>1%</u>	<u>5,453</u>	<u>1%</u>
Total Labor Force Ages 16+	397,021	100%	469,311	100%	515,654	100%	533,417	100%
In the Labor Force	397,021	60%	469,311	60%	515,654	60%	533,417	60%
Not In Labor Force	<u>261,958</u>	<u>40%</u>	<u>311,875</u>	<u>40%</u>	<u>339,407</u>	<u>40%</u>	<u>351,909</u>	<u>40%</u>
Total Population Ages 16+	658,979	100%	781,186	100%	855,060	100%	885,326	100%
Blue Collar Workers	132,989	36%	165,619	39%	192,464	39%	198,197	39%
White Collar Workers	<u>237,773</u>	<u>64%</u>	<u>258,457</u>	<u>61%</u>	<u>297,205</u>	<u>61%</u>	<u>307,180</u>	<u>61%</u>
Total Labor Force Ages 16+	370,762	100%	424,076	100%	489,670	100%	505,378	100%
Per Capita Income	\$19,472	.	\$25,607	.	\$30,694	.	\$35,257	.

Source: Underlying data provided by the 2000 and 2010 US Census and American Community Survey through 2019. Analysis, projections, and exhibit prepared by LandUseUSA | Urban Strategies; 2021.

The State of Arizona, Southwest United States



Retail Market Parameters The State of Arizona

	2000 Census	2000 Share	2010 Census	2010 Share	2020 Estimates	2020 Share	2025 Projections	2025 Share
Population by Age								
0 to 4	378,142	7%	455,716	7%	441,094	6%	468,016	6%
5 to 14	772,604	15%	902,346	14%	936,030	13%	937,182	12%
15 to 19	360,138	7%	461,583	7%	478,052	7%	489,405	6%
20 to 24	362,059	7%	442,585	7%	496,425	7%	501,436	7%
25 to 34	739,714	14%	856,694	13%	991,917	14%	1,020,600	13%
35 to 44	783,019	15%	822,495	13%	887,387	12%	949,352	13%
45 to 54	626,860	12%	842,548	13%	858,576	12%	857,853	11%
55 to 64	439,316	9%	726,230	11%	872,370	12%	865,599	11%
65 to 74	366,191	7%	497,893	8%	732,569	10%	826,863	11%
75 to 84	234,479	5%	280,540	4%	392,523	5%	501,741	7%
85+	<u>68,146</u>	<u>1%</u>	<u>103,400</u>	<u>2%</u>	<u>143,353</u>	<u>2%</u>	<u>164,427</u>	<u>2%</u>
Total Population	5,130,668	100%	6,392,030	100%	7,230,295	100%	7,582,474	100%
Median Age	34	.	36	.	38	.	39	.
Seasonal Population	315,127	6%	392,600	6%	444,086	6%	465,717	6%

Source: Underlying data provided by the 2000 and 2010 US Census and American Community Survey through 2019. Analysis, projections, and exhibit prepared by LandUseUSA | Urban Strategies; 2021.

Retail Market Parameters The State of Arizona

	2000 Census	2000 Share	2010 Census	2010 Share	2020 Estimates	2020 Share	2025 Projections	2025 Share
Educational Attainment								
Grade K - 8	204,688	6%	212,655	5%	210,334	4%	219,296	4%
Grade 9 - 11	364,749	11%	330,521	8%	366,187	8%	385,560	7%
High School Graduate	791,865	24%	1,035,077	25%	1,183,915	24%	1,250,939	24%
Some College, No Degree	859,164	26%	1,097,489	27%	1,243,363	25%	1,316,930	25%
Associates Degree	219,346	7%	336,052	8%	417,639	9%	446,797	9%
Bachelor's Degree	493,363	15%	691,059	17%	875,309	18%	939,625	18%
Graduate Degree	272,734	8%	381,536	9%	516,025	11%	556,419	11%
No Schooling	<u>49,906</u>	<u>2%</u>	<u>45,412</u>	<u>1%</u>	<u>65,923</u>	<u>1%</u>	<u>70,870</u>	<u>1%</u>
Age 25+ Population	3,255,815	100%	4,129,800	100%	4,878,695	100%	5,186,436	100%
Some College or a Degree	1,844,607	57%	2,506,135	61%	3,052,336	63%	3,259,771	63%

Source: Underlying data provided by the 2000 and 2010 US Census and American Community Survey through 2019. Analysis, projections, and exhibit prepared by LandUseUSA | Urban Strategies; 2021.

Retail Market Parameters The State of Arizona

	2000 Census	2000 Share	2010 Census	2010 Share	2020 Estimates	2020 Share	2025 Projections	2025 Share
Employment								
Civilian, Employed	2,232,748	94%	2,709,131	90%	3,495,645	95%	3,711,670	94%
Civilian, Unemployed	133,346	6%	292,718	10%	169,421	5%	199,158	5%
In Armed Forces	<u>20,687</u>	<u>1%</u>	<u>18,648</u>	<u>1%</u>	<u>20,226</u>	<u>1%</u>	<u>20,311</u>	<u>1%</u>
Total Labor Force Ages 16+	2,386,781	100%	3,020,497	100%	3,685,292	100%	3,931,139	100%
In the Labor Force	2,386,781	61%	3,020,497	61%	3,685,292	64%	3,931,139	65%
Not In Labor Force	<u>1,521,137</u>	<u>39%</u>	<u>1,923,993</u>	<u>39%</u>	<u>2,073,458</u>	<u>36%</u>	<u>2,149,759</u>	<u>35%</u>
Total Population Ages 16+	3,907,918	100%	4,944,490	100%	5,758,749	100%	6,080,898	100%
Blue Collar Workers	829,743	37%	1,052,945	39%	1,353,637	39%	1,429,471	39%
White Collar Workers	<u>1,402,682</u>	<u>63%</u>	<u>1,656,186</u>	<u>61%</u>	<u>2,142,008</u>	<u>61%</u>	<u>2,282,200</u>	<u>61%</u>
Total Labor Force Ages 16+	2,232,425	100%	2,709,131	100%	3,495,645	100%	3,711,670	100%
Per Capita Income	\$19,987	.	\$26,402	.	\$31,694	.	\$36,450	.

Source: Underlying data provided by the 2000 and 2010 US Census and American Community Survey through 2019. Analysis, projections, and exhibit prepared by LandUseUSA | Urban Strategies; 2021.